

# MVP Live - Goal Setting & Tracking

**S** – Specific

**M** – Measurable

**A** – Attainable

**R** – Relevant/Realistic

**T** – Time based

## **Annual Premium Sold Goal:**

\$1,000,000

## **Monthly Premium Sold Goal:**

Annual Premium Sold Goal / 12 months = Monthly Premium Sold Goal

$\$1,000,000 / 12 = \$83,333.33$

## **Weekly Premium Sold Goal:**

Monthly Premium Sold Goal / 4 weeks = Weekly Premium Sold Goal

$\$83,333.33 / 4 = \$20,833.25$

## **Number of Households Sold per Week:**

Weekly Premium Sold Goal / Average Premium per Household = Number of Households Sold per Week

$\$21,000 / \$3,000 = 7$  Households Sold per Week

\*How do I find this? Export QA/SA Activity, highlight premiums quoted column & look at the average, highlight premiums sold column & look at the total premiums sold

## **How many households do you need to quote to sell your households sold per week goal?**

# Of Households Sold Per Week / Your Average Closing Ratio (in a decimal) = Number of Quotes to Complete

$7 / 0.2 = 35$  Quotes per Week

\*How do I find this? Use the Marketing Report

## **How many households do you need to call to meet your quotes per week goal?**

# Of Households Sold per Week / Your Average Quote Ratio (in a decimal) = Number of leads to purchase or contact

$35 / 0.2 = 175$  households called per week

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## **How many phone calls will it take to close these sales?**

# Of households called per week x average number of calls prior to a sale = number of calls per week

$175 \times 15 = 2625$  phone calls per week

## **How many calls per staff member, per week?**

# Of households called per week / number of staff members in your office = # of calls per staff member, per week

$2625 \text{ phone calls} / 4 \text{ staff members} = 656.25 \text{ calls per staff member, per week}$

## **How many calls per staff member, per day?**

# Of calls per staff member per week / 5 days = # of calls per staff member, per day

$656.25 / 5 = 131.25 \text{ calls per staff member, per day}$